

# DEPARTMENT OF PUBLIC HEALTH AND HUMAN SERVICES



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## STATE OF MONTANA

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Moya Thompson  
White House Conference on Aging  
4350 East-West Highway, Suite 300  
Bethesda, MD 20814

Dear Ms. Thompson:

Attached are the results of the input we received during Montana's Governor Conference on Aging as it relates to the six topic areas being addressed at the White House Conference on Aging.

Conference participants were asked to discuss each topic area laid out by the White House Conference on Aging as it relates to Montana. We asked them to limit their discussion and planning to a few ideas they want the U.S. Congress to address as they look at reauthorizing the Older Americans Act. The six areas we discussed were Planning Along the Lifespan; The Workplace of the Future; Our Community; Health and Long Term Living; Social Engagement; and the Marketplace. Within these six major topics the priorities were:

1. Financial fraud and exploitation
2. Keep older workers in the workforce
  - a. Incentives for training older workers
  - b. Offer choices for a phased retirement
  - c. Job sharing
  - d. Incentives for employers especially in rural/frontier communities
3. Senior Centers – role now and in the future
  - a. Resource centers for community
  - b. Access to health screenings and services
  - c. Hub of activities – recreation, social, educational
4. Care management
  - a. Funding to develop referral resources
  - b. Ability to share data among providers related to clients
  - c. Communication improvement
  - d. Sharing client information between health and aging providers
5. Access to affordable and quality services

- a. Nutrition program
  - b. Increased funding for wages and benefits for caregivers
  - c. Make sure health care is available in frontier and rural communities
  - d. Improve and enhance transportation services
6. Intergenerational Activities
- a. Change attitudes towards the elderly
  - b. Support programs that integrate the generations
  - c. Educational activities

We have enclosed the notes from the various work groups which provide some additional detail and ideas for each of the topic areas.

Another issue, which keeps coming up in Montana, relates to planning for the future. While it was not specifically addressed during our White House Conference event, there is a real concern regarding the Federal and State governments' ability to meet the needs of our aging society. As everyone knows, the "Baby Boomers" are coming and they will impact the health and human services system "big time" as they age. And along with this group are those who will be in their 80's, 90's and 100's by the year 2025. With a rural/frontier factor like we have in Montana along with the elderly population expected to be at least 20% and as high as 40% of a county's total population, the question is; "How can we ever meet the expected future needs of an aging society if we don't set aside funding now?" Based on this, we suggest that Congress require that each State establish an "Older Americans Act Trust Fund" and begin to set aside funding for the future needs of older Americans. Congress could provide some funding and each state would have to set up a state trust fund for the elderly. At a minimum, each state would have to match what Congress provided, and establish a Federal and State funding source to increase the funding in each state's trust fund for the next 30 to 40 years.

Thank you for allowing us the opportunity to participate in the providing you input into the White House Conference on Aging.

I hope our remarks are helpful to you as well as those who have been selected to represent their respective States.

Sincerely,

Charlie Rehbein  
Aging Services

**Prioritization for White House Conference on Aging  
Held at the Montana Governor's Conference on Aging  
May 19, 2005**

"No one person is smarter than all of us!"- Percy Devine, Administration on Aging

Several work groups at the end of the Governor's Conference brainstormed a number of issues and areas of concern as input for our delegates to the White House Conference on Aging. Some issue areas received a lot of attention and idea generating. Our delegates will have good suggestions to carry to Washington on behalf of Montanans.

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**Planning along the lifespan.**

I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

- Financial fraud abuse and exploitation.
- Congress needs to know and address the problem and provide nationwide protection against financial exploitation of seniors and moving assets across state lines.
- II. Why are these important to Montana and Montanans?
  - Currently the out-of-state exploiters cannot be prosecuted within our borders. Some are free to exploit from their own state without being caught and sentenced.
- III. What are some ideas for implementing the approaches we recommend in our state?
  - There needs to be a national and federal focus that would bring quick action to prosecute and stop the exploiters.
- IV. Who could help?
  - All national, state, and federal agencies that monitor and track seniors' fraud, abuse and exploitation issues.
- V. What will make this do-able and achievable? What strengths do we already have in our state to make this become reality?
  - Seniors need to have access via phone, computer, and word-of-mouth networks to all agencies that would be designated by Congress.

#### Planning along the lifespan

- I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?
  - Social Security programs. Make sure what we have now stays in place.
  - Pension.
  - Medicare and Medicaid.
- II. Why are these important to Montana and Montanans?
  - Need Social Security.
  - Stay independent.
  - Financial frauds. Take care of this.
- III. What are some ideas for implementing the approaches we recommend in our state?
  - Grassroots with the legislature.
  - Huge numbers in the legislature.
  - Trust fund.
- IV. Who could help?
  - Legislature, businesses, hospitals.
  - Retirement systems are able to continue.
  - Mandate private sector companies and any public entity to have a system.
  - Organizations.
- V. What will make this do-able and achievable? What strengths do we already have in our state to make this become reality?
  - DPHHS budget.
  - Advocate in House and Senate.

#### **The workplace of the future**

- I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?
  - Discourage forced retirement and provide incentives for keeping older workers.
  - Offer choices for phased retirement.
  - Job sharing.
- II. Why are these important to Montana and Montanans?
  - Improve quality of life.

- Keeping expertise.

III. What are some ideas for implementing the approaches we recommend in our state?

- Educate employers about the advantages of older workers.
- Tax incentives for employers to keep older workers.
- Offer interim health plans.

IV. Who could help?

- State and federal legislators, AARP and other senior organizations, state and local training to update skills, neighbors and friends.

V. What will make this do-able and achievable? What strengths do we already have in our state to make this become reality?

- College of technology, adult education, and intergenerational programs.

#### Workplace of the future

I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

- Incentives for training older workers.
- Strategies to prevent age discrimination.
- We need to keep our older workers involved (as a resource) by balancing work challenges.
- Recognition and financial incentives to keep our workforce resources strong.

II. Why are these important to Montana and Montanans?

- All the retired or retiring workers' talents, skills, knowledge and abilities will otherwise go to waste. Also, it would increase their interest and incomes.

III. What are some ideas for implementing the approaches we recommend in our state?

- Present interesting training programs that would place us into the workforce of the future.

IV. Who could help?

- Employers looking for reliable, trusted and loyal employees who are looking to contribute their many talents to an employer who can help a senior live a more challenging life.

V. What will make this do-able and achievable? What strengths do we already have in our state to make this become reality?

- Senior classes at the community college, Job Service, and willing employers to provide financing for retraining.

#### Workplace of the future

I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

- Assume that seniors can volunteer and don't need compensation.
- Medical coverage changes and doesn't always cover cost.
- Providers are option out of insurance coverage. People have to find a way to get out-of-town providers.
- Medicare does not cover all medical costs and services, contrary to popular belief.
- Harder to find employment at older age.
- Need programs to update and retrain older workers.

II. Why are these important to Montana and Montanans?

- Older workers have experience and work ethic.
- If younger workers leave, older workers will be needed to fill jobs.

III. What are some ideas for implementing the approaches we recommend in our state?

- Give business incentives to keep and hire older workers.

– Develop SCSEP (experience works) at state and local level.

IV. Who could help?

– Legislature.

– Office on Aging / Aging Network.

V. What will make this do-able and achievable? What strengths do we already have in our state to make this become reality?

– Publicize issue at the state and local level to get support for incentives or state and local SCSEP Programs.

### **Our community**

I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

– Appeal of Senior Centers now and in the future.

– Senior Center coordinates (network for one stop shopping). Funding, activities, services

– Nutrition. Funding, space, daily versus weekly meals. Increase commodities.

– Adequate facilities.

– Preserving the rural heritage of Montana.

– Intergenerational activities.

II. Why are these important to Montana and Montanans?

– Live independent, healthy lives in their rural areas.

III. What are some ideas for implementing the approaches we recommend in our state?

– Full-time, PAID, trained coordinator for each senior center.

– More money for facilities, food programs, and transportation.

IV. Who could help?

– Federal, state and local government. Based on population SERVED.

V. What will make this do-able and achievable? What strengths do we already have in our state to make this become reality?

– The dedicated people in Montana.

### **Our Community**

I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

– Senior Centers. People aren't coming because they don't consider themselves seniors. People come to eat and play cards only.

– Be part of the community, not an island to sell.

– Adult day care center in the Senior Center.

– Reading program for seniors to read to young children.

II. Why are these important to Montana and Montanans?

– This is an issue for frontier areas.

III. What are some ideas for implementing the approaches we recommend in our state?

– Home and community based care, and after-hospital care.

– More volunteers.

– Churches more involved.

– Be part of the community, not an island.

IV. Who could help?

– RSVP program is good.

V. What will make this do-able and achievable? What strengths do we already have in our state to make this become reality?

– Senior Centers have a motto of community service.



## Our Community

I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

- Configuration of Senior Centers to appeal to the next generation of senior citizens.
- Call it a Community Center.
  - Create a generational integrated environment, which attracts all ages.
  - Include thrift store, for-profit for the Center.
  - Coffee shop.
  - Activities for men: electronic repair, mechanical activities and carpentry.
  - Community garden – could benefit food bank.
  - Movie Theater
  - Library.
  - Computer and other education-learning center.
  - Park with playground for children.
  - Youth center components.
  - Assisted living component.
  - Entertainment and fitness (bowling, golf).
  - Resource Center.
  - Swimming pool.
  - Access to health screenings and services.
  - Transportation and day trips.

### Objectives:

- Provide employment opportunities for youth and seniors.
- Volunteer opportunities.
- Utilize skills and encourage development of new skills.
- Brings community together and prevents fragmentation.
- Improving quality of life and community.
- Prevent institutionalization and isolation.
- Promote independence.
- Healthful environment for children.
- Hands-on support – and emotional – for family care givers.
- Provide dignity and meaning to the lives of elders.

Create a community in which we can age, not a community that just reacts to problems associated with aging. This concept will require collaboration of numerous organizations and governmental agencies.

## Our community

I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

- Money to develop regional referral resources.
- Greater socialization and resource diversity; image and marketing revision.
- Care manager funding. Simplify process and remove redundant functions. Improve inter-discipline communication.

II. Why are these important to Montana and Montanans?

- Coordination between health and Aging Network. Benefits: cost effective and assists ineffective delivery of services. Improves administrative efficiency.
- Driven by need – baby boomer crunch.
- Because Montana is already doing more with less and needs more dollars to go to direct care.
- Montana has fewer choices for life quality improvements for the elderly.

III. What are some ideas for implementing the approaches we recommend in our state?

- Password information exchange to build system to meet or exceed federal guidelines.
- More frequent regional rural planning opportunities – and funded.
- Help for Area Agencies' technology, human resources, and money resources.

IV. Who could help?

- Federal government, state government, and private / public partnerships.

V. What will make this do-able and achievable? What strengths do we already have in our state to make this become reality?

Our community

I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

- Uni-education on services.
- Senior Centers (social appeal). Consider name change.
- Baby boomers.

II. Why are these important to Montana and Montanans?

- Can't offer services you don't know.
- Need to attract male population.
- Network, money.

III. What are some ideas for implementing the approaches we recommend in our state?

- State communication, meeting of staffs.
- Network out of state.

Our community

I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

- Configuration of senior centers to appeal to the next generation of senior citizens.

There are currently not diverse activities for the younger, active seniors.

- Sharing client information across multiple management systems.
- Provide assistance to elderly in emergency situations.
- Accommodate the differences between baby boomers, the aging population, and previous generations of the elderly.

II. Why are these important to Montana and Montanans?

- As older people die, younger seniors are not taking their place. It is difficult to attract the next generation of seniors who could benefit from services.
- We need to make sure seniors get help they need and to be able to reach them in the event of an emergency, in respect to privacy laws, and need to know who they are.

III. What are some ideas for implementing the approaches we recommend in our state?

- Statewide network of Area Directors on Aging. Create this network beyond what exists now.
- Comprehensive survey of state and community to determine the needs and wants of the next generation.
- Exchange newsletter.
- Statewide database accessibly by health care specialists, aging networks, etc. to reach client information in case of an emergency.

IV. Who could help?

- Existing Area Agency on Aging Directors.
- State agencies, such as for databases.
- Those who impact privacy law implementation.
- First contacts.
- Legislators.
- Low emergency services.

V. What will make this do-able and achievable? What strengths do we already have in our state to make this become reality?

- Strengthening abilities to communities.
- Funding: goals worked into existing grants, as well as increased funding for the state.
- Existing Centers need improved communication between them.

Our community

I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

- Share client information across multiple systems.
- Coordinate between health and aging networks.
- Home and community-based care following hospitalization.
- Provide caregiver support.

II. Why are these important to Montana and Montanans?

- Continuity of care.
- Vastly rural state.
- Reduce re-admissions and repeat problems.
- Reduce frustration to access services.
- Simplifies a cumbersome process.

III. What are some ideas for implementing the approaches we recommend in our state?

- One main central intake database of personal information, according to area agency regions.
- Get 211 up and running statewide.
- More money for case management and in-home services.

IV. Who could help?

- Entertainment industry taxes (sports, movies, professional), big business endowments, gambling revenue, and Tribal funding.

V. What will make this do-able and achievable? What strengths do we already have in our state to make this become reality?

- Legislation (state and federal), lobby, education.
- Strengths: A huge senior population, an untapped natural resources, and young people who want to stay in Montana.

### **Health and long-term living**

I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

- Nutrition program. Don't slash Ag program.
  - Delivery of quality care by care givers.
    - Incentives for family members to care for aging relatives.
    - Hard to find caregivers, and then also to pay for them.
    - People want to stay in their community. Care facilities are full.
    - Finding reliable help for in home care.
    - Frontier areas have problems with access to services.
    - Need more home and community-based services.
  - Need more workers who are paid a decent wage.
  - Transportation to grocery store, doctor's, etc.
    - The money to buy and operate vehicles.
    - Volunteers to take people where they need to go. Senior Center has an auto; volunteers drive people.
    - Gas money to give for people who drive other people.
    - The town of Circle has a vehicle going to MC, and a set fund to on it.
  - Communication – getting the message out.
  - Options to provide in home care – more funding.
    - Center directors say, "I don't have the money or the people."
- III. What are some ideas for implementing the approaches we recommend in our state?
- Tax incentive.
  - Make them "community centers."
- IV. Who could help?
- Volunteers. In Circle, you can call to get your lawn mowed...
- V. What will make this do-able and achievable? What strengths do we already have in our state to make this become reality?
- It's not only what the community can do for the seniors, but also what seniors can do for the community!

#### Health and long-term living

- I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?
- Access to affordable, quality services.
  - Delivery of quality care by caregivers.
  - Increased wages and benefits for caregivers.
  - Have day care provided for caregivers as incentive to work.
  - Shortage of paid workers for elderly services.
  - Lack of respect for the elderly.
  - Lack of professionalism.

## II. Why are these important to Montana and Montanans?

- Montana's aging population is growing.
- We are relying on elderly taking care of the elderly because we are losing our young people to the other states.

## III. What are some ideas for implementing the approaches we recommend in our state?

- Pass bills in the Legislature, which means where's the money going to come from?
- The "choices grant" should be able to help with caregiver education for Area II Agency on Aging.
- Spouses should receive a stipend as a caregiver.

## IV. Who could help?

- Hospitals.
- Private care facilities.

## V. What will make this do-able and achievable? What strengths do we already have in our state to make this become reality?

- Money, money, money!
- Our Area Agency has a support group that can help implement these approaches.

## Health and long-term living

### I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

- Access to affordable, high quality services:
  - Keep Social Security benefits at sufficient level to keep a reasonable quality of life.
  - Monitor Medicare D. Peg the costs of medicines to reasonable research funds and cost of inflation!
  - Reasonable reimbursement for long distance medical care.
  - Expand necessary services to serve rural communities. Provide adequate training and sufficient/reasonable compensation with benefits so a career in social services could provide a living for a family.
  - A more centralized data system to get adequate information with consumer follow-up. ADRC.
  - Intra-agency identification to facilitate cooperation, such as about HIPAA issues, between agencies.
- Delivery of quality care by caregivers:
  - Larger more effective telecommunications system statewide in satellite offices. Tele-medicine used as information, educational and medical information.
  - Systems are not inter-connected; should be able to have the entire state involved. Everyone needs to be able to hear the same information at the same time for information and referral.
  - New service delivery system for age and disease appropriate clients. Example: younger, not appropriate aged long term care facilities.
  - Extended leave to care for families with an assurance of job security even for extended periods.

## Health and long term living

I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

- Affordable and accessible long term care.
  - Transportation, sliding income scales, tele-medicine.
- Education and prevention. Technology.
- Incentives: Pay scale, training, benefits, recognition, continuing education.
- Health information and technology.
- Resource centers: Expansion of resource centers.

II. Why are these important to Montana and Montanans?

- The increased population of seniors.

III. What are some ideas for implementing the approaches we recommend in our state?

- Impact pay scale, training, benefits, recognition and continuing education.

IV. Who could help?

- Area Agencies, Resource Centers, volunteers, PCA training centers, colleges, hospitals, state legislature, and the Older American Act – PCA training.

V. What will make this do-able and achievable? What strengths do we already have in our state to make this become reality?

- Federal grants, local interest, local high school building programs, building incentives for contractors.
- Funding through state and federal government and local.

## Social engagement

I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

- Strategies to change attitudes toward the elderly.
- intergenerational: Supporting programs that integrate the generations as a way of life and returns value to seniors.

II. Why are these important to Montana and Montanans?

- They are enormous resources that are not being used. If you change the attitude and divisions that will help solve other problems like loneliness, safety and inactivity.

III. What are some ideas for implementing the approaches we recommend in our state?

- Restructuring senior centers to be family centers.
- Create more networking among services that serve different ages. Joint funding ventures.
- Provide incentives and/or funding for partners or providers who do this.

IV. Who could help?

- Educators: Quit portraying seniors as “old.”
- Identify some active and healthy seniors and make them more visible.
- Quit separating people by age.
- Challenge communities to be a model of Intergenerational teamwork, through a contest or award.

V. What will make this do-able and achievable? What strengths do we already have in our state to make this become reality?

- City leaders, legislators, city planners, teachers, general citizens, and Chambers of Commerce.
- Existing community, wisdom of the Native American culture, and educated and qualified seniors.

#### Social engagement

I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

- Promoting expanded opportunities.
- Intergenerational.
- Volunteer groups for care givers.
- Liability: reduce liability and provide training.

II. Why are these important to Montana and Montanans?

- Get back to taking care of one another.
- Get the elderly out in the public.

III. What are some ideas for implementing the approaches we recommend in our state?

- Creating volunteer groups.
- Funding.

IV. Who could help?

- Senior Citizens' Centers.
- RSVP.
- Business mainstream.

V. What will make this do-able and achievable? What strengths do we already have in our state to make this become reality?

- Senior Centers, Area Agencies on Aging, DPHHS, State Commission, Care giver Commission.

## Marketplace

I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

- New packaging for food products to accommodate 1-2 person households.
- Easy open packaging for foods and medicines.
- Exercise equipment that is senior friendly and affordable.
- Senior housing with exercise room.
- Promote availability of senior exercise programs.
- Make transportation available outside the 8:00-5:00 schedule.

## Marketplace

I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

- Critical transportation for rural areas to medical care, groceries, and pharmacies.
- More bus service! Public senior buses and after 5:00 PM.
- Amtrak.
- Already limited services.
- Additional funding to preserve and expand on it when and where it's needed.
- Housing: Tremendous increase in the demand for affordable housing.

II. Why are these important to Montana and Montanans?

- Long distances between services and town.
- Cities with no services.

III. What are some ideas for implementing the approaches we recommend in our state?

- More jobs.
- Keep Amtrak and smaller senior towns buses etc.
- Bring some services weekly or on a schedule to seniors.
- Use more money to help our people.

IV. Who could help?

- Legislature, city, county, state and federal.
- Individuals to carry the message and retain funding for Amtrak and bus service.

V. What will make this do-able and achievable? What strengths do we already have in our state to make this become reality?

- We have commodities like grain, cattle, and other freight, plus people for the train.

## Marketplace

I. Which few ideas most need attention by Congress? Which few of the ideas within our subject area do we most want to see pursued? Which are the priorities we want to focus energy on in Montana?

- Transportation grant
  - Subsidize buses for senior transportation.
  - Social, shopping, concerts, airports, moves.
  - Reasonable and flexible schedules and routes.
  - Maintenance.
  - Affordable for seniors.
  - Insurance provided.
  - Certified drivers.**the**

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